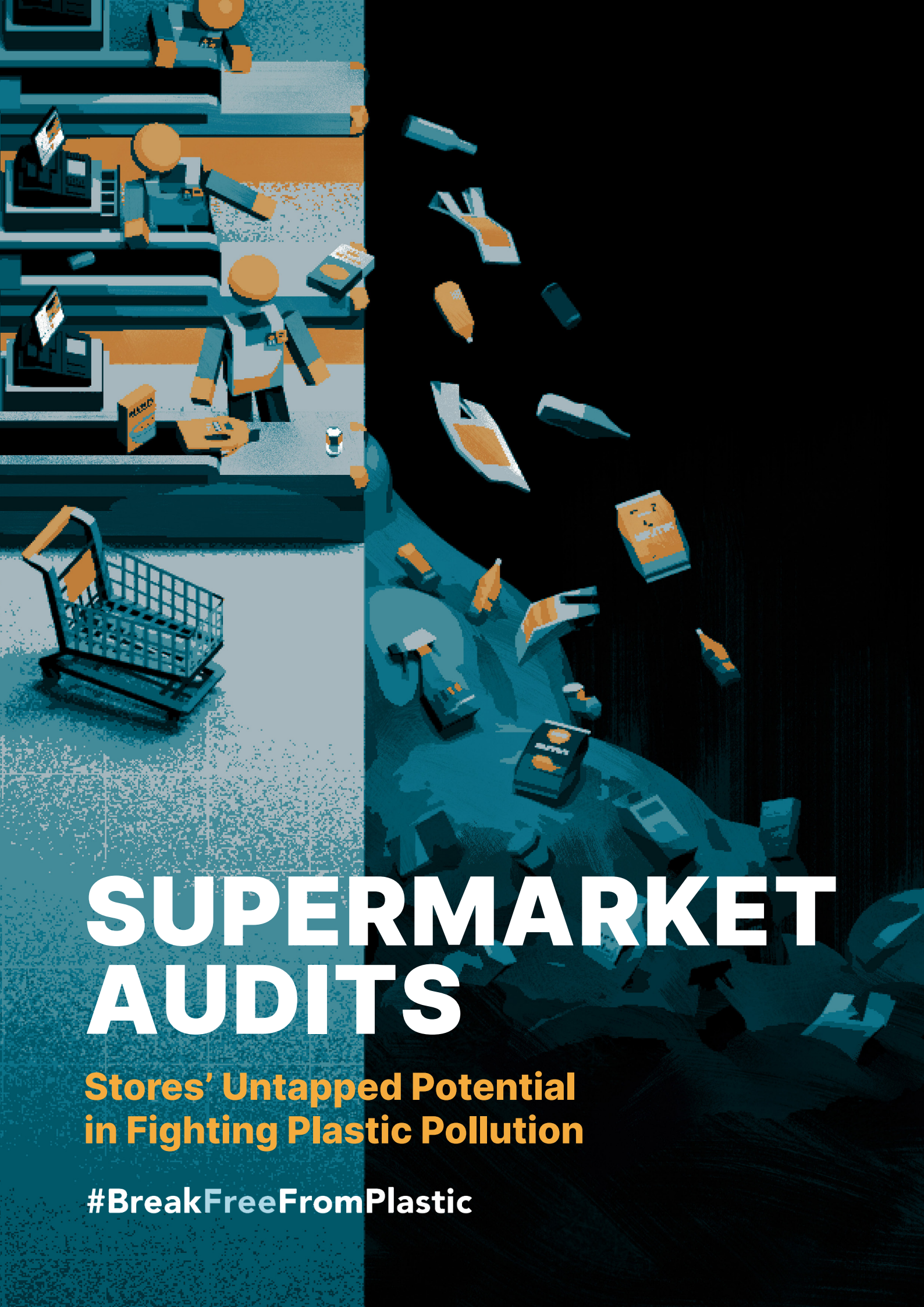


SUPERMARKET AUDITS

Stores' Untapped Potential in Fighting Plastic Pollution

#BreakFreeFromPlastic

Executive Summary

ESPAÑOL (CLICK AQUI) | FRENCH (CLIQUEZ ICI) | DEUTSCH (HIER KLICKEN) | BAHASA INDONESIA (KLIK DI SINI)

In the global fight to tackle plastic pollution, one key part of the plastic lifecycle has so far escaped detailed scrutiny for the role it plays. Supermarkets are how an ever increasing number of people around the world purchase their daily essentials, frequently packaged in plastic. Supermarkets provide their customers access to long shelf life foods, fresh produce regardless of season, and personal care and household goods from global multinationals. All of these items rely on plastic packaging that is normally single-use and often very hard or impossible to recycle. In many countries, supermarkets are replacing traditional methods of shopping - markets, local food sources, buying the exact quantities needed - low plastic ways of acquiring daily necessities.

This report documents the first citizen science effort to audit supermarkets around the world on their plastic related business practices. The aim is to understand how supermarkets are contributing to plastic pollution, or contributing to efforts to reduce it. Hundreds of volunteers in 27 countries went to their local supermarkets with a questionnaire, to gather data on in-store practices.

Even though the global logistics networks of supermarkets currently rely heavily on plastic packaging to enable it, there are a number of in-store business practices that all supermarkets could implement to reduce the use of single-use plastic packaging. These practices are not new or untested, they are already in use around the world. Things like reusable glass bottles with deposits to encourage return, loose fruits and vegetables, loose dry goods and counters for meat, fish and deli items all reduce plastic use and could be important tools in tackling plastic pollution.

The audit findings show that supermarkets are not doing nearly enough to reduce the amount of plastic generated. While we found examples of every positive practice in action somewhere, they are far from being the norm. In many cases, measures have only been implemented where stores are forced to by legislation. We call on supermarkets to implement these simple, low hanging fruit practices to reduce plastic pollution immediately, and not wait for legislation. In the face of a crisis that is damaging the climate, environment, human health and countless communities, all sectors must take action to urgently reduce their reliance on plastic. It's time for the supermarket sector to take responsibility for the plastic they sell.

Acknowledgements

Thank you to the hundreds of volunteers from 36 organsations around the world for your time and effort to conduct the first ever supermarket audits. We are grateful for your patience as we developed the new methodology and ironed out teething problems. Without your enthusiasm to get involved, there would be no supermarket audits. We are especially thankful to our key partners - Exit Plastik Alliance, Trash Hero, Adansonia Green, Fundación El Árbol, Fundación Apaztle, Plastico Project, Nipe Fagio, ECOTON and Pan African Vision for the Environment. Thank you to Kaitlin Trent for the invaluable support in the early days of this project. Finally, we would like to extend our deepest gratitude to the Flotilla Foundation for the financial support that enabled the development of the supermarket audits.

Introduction

Plastic has become inextricably linked with modern convenience, yet its lifecycle poses profound global challenges.

Since nearly all plastics are derived from fossil fuels like oil and gas, producing it significantly contributes to climate change by releasing harmful greenhouse gases. Alongside this climate impact, plastic waste has created a massive pollution crisis. It harms wildlife, destroys human health and livelihoods, and overwhelms our systems for managing waste worldwide.

Supermarkets play a critical role in this situation. As one of the main places people buy everyday goods, mostly packaged in plastic, they share responsibility with consumer goods companies for much of the single-use plastic that ultimately pollutes the environment. **This report offers a world-first snapshot of supermarket in-store business practices that either facilitate efforts to reduce plastic use, or increase the amount of plastic waste in the world.** Hundreds of volunteers collected data on store practices by auditing stores around the world using a standardized questionnaire. Through this citizen science effort, we have been able to investigate whether supermarkets are implementing basic best practices that

> Supermarkets play a critical role in this situation.

reduce how much single use plastic is needed. We hope that this snapshot of the supermarket sector will shine a light on the simple changes supermarket brands can make that could have a dramatic effect on how much plastic is used for grocery shopping. All of the 'plastic pollution positive business practices' we have audited - meaning that the practice helps reduce plastic use - are already implemented in some stores around the world. These can be considered the low hanging fruits of changes supermarkets can easily make, before addressing areas where more innovation may be needed.

Beyond the visible environmental damage caused by plastic pollution, a growing body of research is uncovering the potential impacts of plastic pollution on human health. Microplastics, and even smaller nanoplastics, have been detected in human blood, lungs, and placentas, entering our bodies through contaminated food, water, and air. While research is ongoing, concerns are mounting regarding potential links to inflammation, endocrine disruption, and other adverse health outcomes. It is clear that plastic pollution is an emerging public health threat. Food packaged in plastic is one known route for microplastics to enter the body, one reason why supermarkets should be working together with food producers to reduce plastic packing for groceries.

The sheer scale of global plastic production underscores the magnitude of the challenge to tackle plastic pollution. Approximately 400 million metric tons of plastic is manufactured annually, a figure that has grown exponentially over the past few decades. Current trajectories project this output could double by 2040 and potentially triple by 2050 if significant interventions are not implemented. A huge chunk of all this plastic, about 40%, is used just for packaging. Within this sector, single-use applications dominate, with food and beverage packaging representing the largest share.

The role of supermarkets

Positioned at the critical junction between producers and consumers, supermarkets play a pivotal role in the plastic lifecycle.

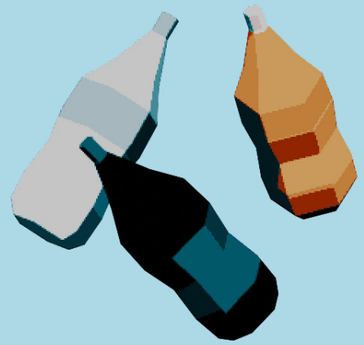
Through their purchasing power and control over shelf space, supermarkets are uniquely positioned to incentivise companies to use less plastic in packaging their products. By setting ambitious targets and procurement policies, they could compel suppliers to innovate and fundamentally redesign products. Supermarkets could also facilitate the infrastructure needed for reusable packaging solutions - as they already do in places with deposit return schemes for reusable bottles.

Supermarkets significantly influence consumer habits through store layouts, product labels, sales promotions, and store branding. Their impact, for example, can be observed in the dramatic reduction in single-use plastic bag usage—as much as 80%—observed in many countries after the implementation of bans or levies. These actions demonstrate that supermarkets are uniquely positioned to either perpetuate the problem or push for and implement solutions. While there is much that supermarkets could be doing to reduce single-use plastic packaging, until now there has been limited scrutiny on their business practices.

The global supermarket sector

The global supermarket retail sector is a huge economic force, representing trillions of dollars in annual sales and in many locations acting as a primary way consumers buy food and household products. Dominant international players include US-based Walmart (the world's largest retailer by revenue, with significant operations in North America and beyond), France's Carrefour (with a strong presence in Europe and Latin America), Germany's Schwarz Group (owning Lidl and Kaufland), US-based Costco (membership warehouse model with global reach), and Germany's Aldi. Other key players include Tesco (UK), Ahold Delhaize (Europe/US), and Kroger (US).

Supermarkets are a key part of today's globalized food system. Supermarket chains have complex logistical networks that bring products from around the world to local shelves. This intricate system offers consumers access to a huge variety of foods year-round. However, this convenience is intrinsically linked to a reliance on plastic packaging. Sourcing fresh produce globally such as berries from South America during a European winter, often relies on plastic packaging. Many foods are made shelf stable through a combination of food additives and plastic packaging. Plastic films, bags, trays, pouches and clamshells become tools to prevent spoilage, maintain moisture levels, reduce physical damage, and ultimately extend the shelf life, allowing fresh produce to survive long-distance travel. This packaging is often made of complex polymers, additives or multiple material types, making it very hard to recycle. The system that gives us so many food options is also driving plastic consumption.



Supermarket audits

The supermarket sector has so far been largely absent in the global conversations around how to tackle plastic pollution. The general public and regulator focus has been on the role of petrochemical companies and consumer goods companies. Even in the ongoing (at the time of publication) United Nations negotiations for a global plastics treaty, the role of supermarkets in plastic pollution proliferation and in the possible solutions is rarely raised. There is a lack of information available on the specific business practices of supermarkets inside their stores - the best practices for preventing plastic pollution, and the worst.

Supermarket audits were developed to address the lack of information on business practices with regard to plastic use and to increase pressure on the sector to address its plastic pollution. This study follows the success of the Break Free From Plastic's Brand Audit project, which used citizen science to identify the world's top plastic polluters. For the inaugural year, we have piloted a new methodology for collecting information on supermarket operations using citizen science, with the intention to conduct audits annually to track progress.

Methodology

The first Supermarket Audit employs a quantitative survey methodology to collect data on different types of supermarkets, of varying sizes and locations around the world. The aim is to build a data set of supermarket business practices that either negatively affect plastic waste generation, are actively reducing plastic waste generation, or could potentially reduce it with small adjustments. We wanted to understand business practices within the same supermarket brands across different locations, between different supermarket brands in the same country, and generally between countries.

Break Free From Plastic movement NGO members around the world were invited to participate in the audit. As this is an initial pilot year, the aim was for NGO staff members to do the audits themselves as a test. However, some NGOs shared the audits with their volunteers and supporters. The data collection effort was not controlled by the central coordination team, instead it was entirely left to whoever was willing to participate, with some basic guidance. This means that data is distributed very irregularly and unevenly, for example, we had a huge effort in Germany, but single digit numbers of audits were conducted in the United States. The audits were conducted from August 28 to November 15, 2024. Surveys were available in Spanish, French, German, Thai, and English languages.

Survey Design

The initial audit consists of 36 questions divided into sections, focusing on various aspects of supermarket business practices. A full list of the survey questions can be found online. Examples include ‘are single use plastic carrier bags available free of charge?’ and ‘are fruits and vegetables available loose?’ Questions are a mix of dichotomous questions, multiple-choice questions, and open-ended questions to allow for both quantitative and qualitative data collection. Based on feedback provided by key BFFP stakeholders involved in the audit process, necessary revisions were made to improve question phrasing and response options. Participants were invited to audit supermarkets of various types and sizes, as well as convenience stores. As convenience stores such as those in inner city environments, in small retail spaces have specific circumstances, additional questions for those were included.

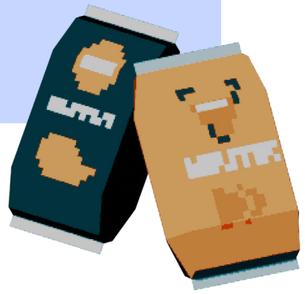
Data analysis

Data was compiled and cleaned using Google Sheets, and analysed using tables and graphs. The data for each question was expressed as a percentage of the total audited stores, or a percentage of audited stores per region. The business practices that have been audited through the survey have been categorised into ‘plastic pollution positive business practices’ to show practices that would actively reduce plastic waste generation, and ‘plastic pollution negative business practices’ for those that contribute to plastic waste generation. The analysis presented in this report focuses on a subset of the questions, and excludes the convenience store audits. As the audit project has developed iteratively, it became clear during the analysis that some questions needed improvement to allow for comparison or for relevant insights to be drawn.

Results and Analysis

THE FIRST GLOBAL SUPERMARKET AUDIT IN NUMBERS:

- **496 individual audits were conducted.**
- **36 organizations participated worldwide, in 27 different countries.**
- **33 individuals, people who did not conduct audits on behalf of an organization participated.**
- **247 unique retailers were audited.**



Key findings:

- Stores are performing poorly in adopting business practices that reduce plastic pollution, apart from where legislation requires them to do so. Nonetheless, we found examples of every positive business practice implemented somewhere in the world, highlighting their feasibility and acceptability to consumers.

- Hardly any stores around the world have implemented simple plastic pollution positive actions such as bulk dry goods sections **(only 14% of audited stores do this)** and removing plastic carrier bags for fresh produce **(only 11%).**

- **44% of audited stores** have bottle deposit schemes, but those are largely attributed to Germany, where **96% of audited stores have them as required by law.** Outside of Germany, only **17% of stores have such initiatives.** This underscored how essential legislation is for driving plastic pollution reduction measures.

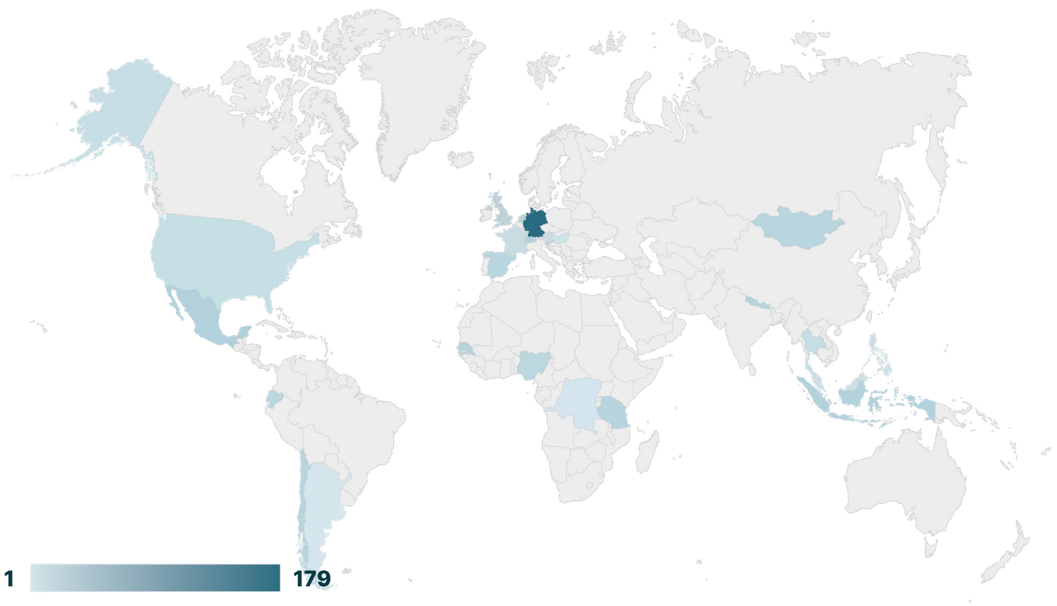
- **58% of audited stores around the world** have no single-use carrier bags available at check out, or place a small charge on them. This is likely due to the widespread regulations to reduce plastic bags around the world - over 100 countries have them.

- **53% of all audited stores globally** have canvas shopping bags for sale as a reusable alternative to plastic bags.

Where were audits conducted?

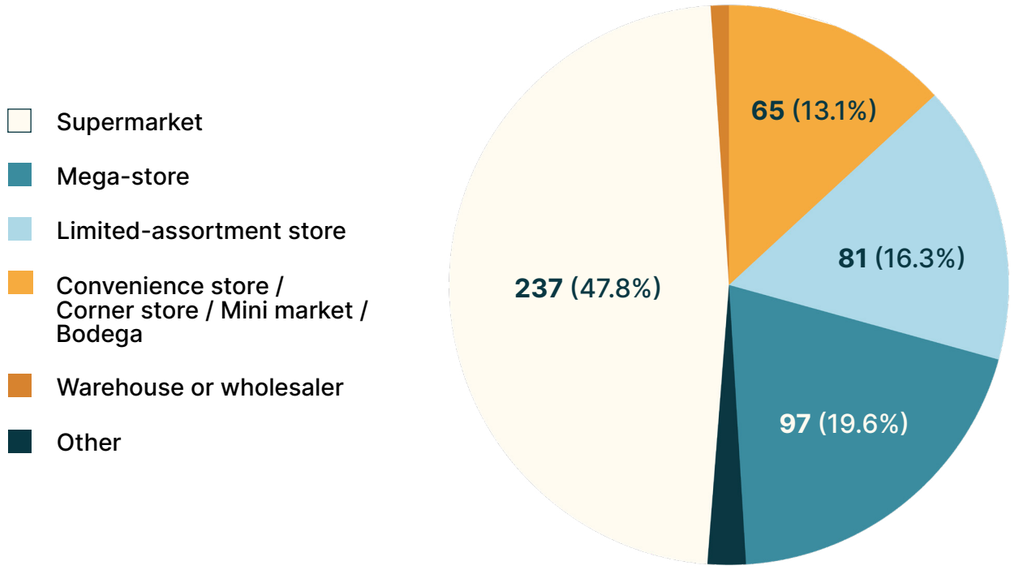
COUNTRY	# OF AUDITS	COUNTRY	# OF AUDITS
Argentina	1	Philippines	4
Austria	1	Puerto Rico	1
Chile	20	Senegal	20
Cyprus	1	Slovenia	8
Democratic Republic of Congo	3	Spain	24
Ecuador	20	Switzerland	16
France	3	Tanzania	22
Germany	179	Thailand	15
Hong Kong	11	United Kingdom	9
Hungary	5	United States	12
Indonesia	26		
Malaysia	1		
Mexico	26		
Mongolia	21		
Nepal	23		
Netherlands	3		
Nigeria	21		

Grand Total **496**



The audit locations reflect the locations of the NGOs who responded to the callout for groups to trial the supermarket audit methodology. All NGOs are members of the Break Free From Plastic movement. The distribution of auditing effort is unevenly spread, with some NGOs conducting just one or two audits in their country, and others conducting upwards of 20. The highest concentration of audits is in Germany where a coalition of NGOs called Exit Plastic Alliance worked with many volunteers to audit 179 supermarkets across the country. We had audits conducted on every inhabited continent which allows us to take a global snapshot of the state of the supermarket industry's business practices and how they help or hinder the prevention of plastic pollution. **The regional breakdown of audits is 65 stores audited in Africa, 12 stores audited in North America, 68 stores audited in Latin America and Caribbean, 101 stores audited in Asia Pacific and 350 stores audited in Europe.**

Types of stores audited



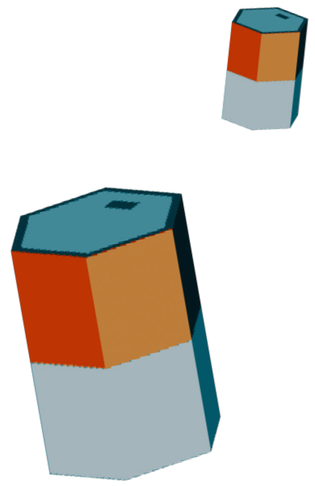
Participants were invited to audit a range of store types, using the following definitions:

- **Mega-store** - a very large store offering more than just groceries for sale. Often offering clothing, home goods, and other such items for sale.
- **Traditional full sized grocery store / Supermarket** - stores offering a full line of groceries, meat, and produce.
- **Limited-assortment store** - a low-priced grocery store that offers a limited assortment, often only selling store branded goods.
- **Warehouse or Wholesaler** - stores that offer goods in large sizes or bulk quantities, such as Costco.
- **Convenience store / Corner Store / Mini-Mart / Bodegas** - a smaller store that offers a small selection of fresh foods, pre-made meals, drinks, etc. With a focus on fast service and convenience.

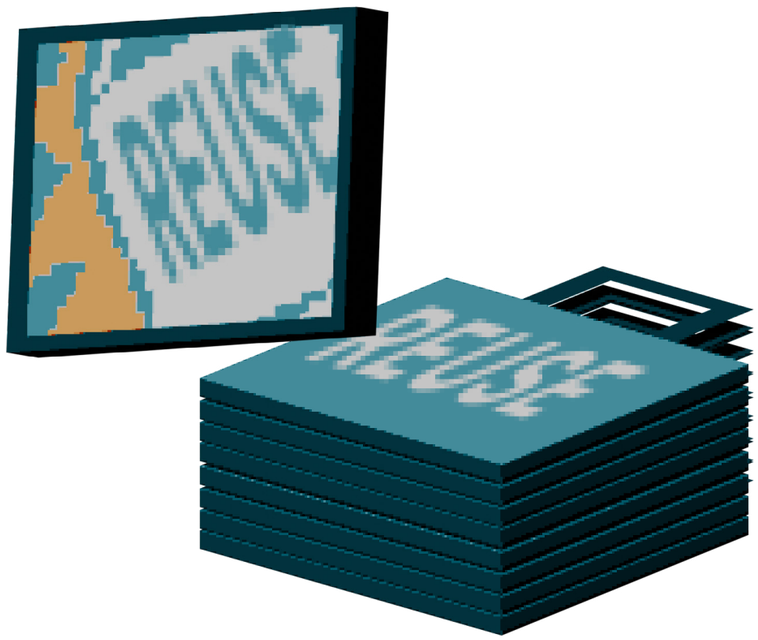
Due to the unique nature of convenience stores, we had a separate set of questions for people who were auditing convenience stores. We have not analysed the answers to those questions here as this was a pilot project and we learned that more work is needed on the convenience store questionnaire to provide useful data.

Store business practices impacting plastic pollution

To help with understanding the types of business practices that are common in stores around the world, we have split the audited practices into two categories depending on how the business practices impact plastic pollution. The categories are ***plastic pollution positive business practices*** that can reduce the amount of plastic used by store customers to have a positive effect on plastic pollution, and ***plastic pollution negative business practices*** that can increase the amount of plastic used by store customers and so negatively affect plastic pollution. This categorisation allows us to see on the aggregate, for each region, the percentage of audited stores that are implementing positive or negative practices. An ideal supermarket that is designed to minimise plastic waste generation would implement all of the positive practices and none of the negative. These are the low-hanging fruits of supermarket plastic pollution prevention - tried and tested ways to minimise plastic use. There are many more things supermarkets can do beyond these to decrease their plastic impact.

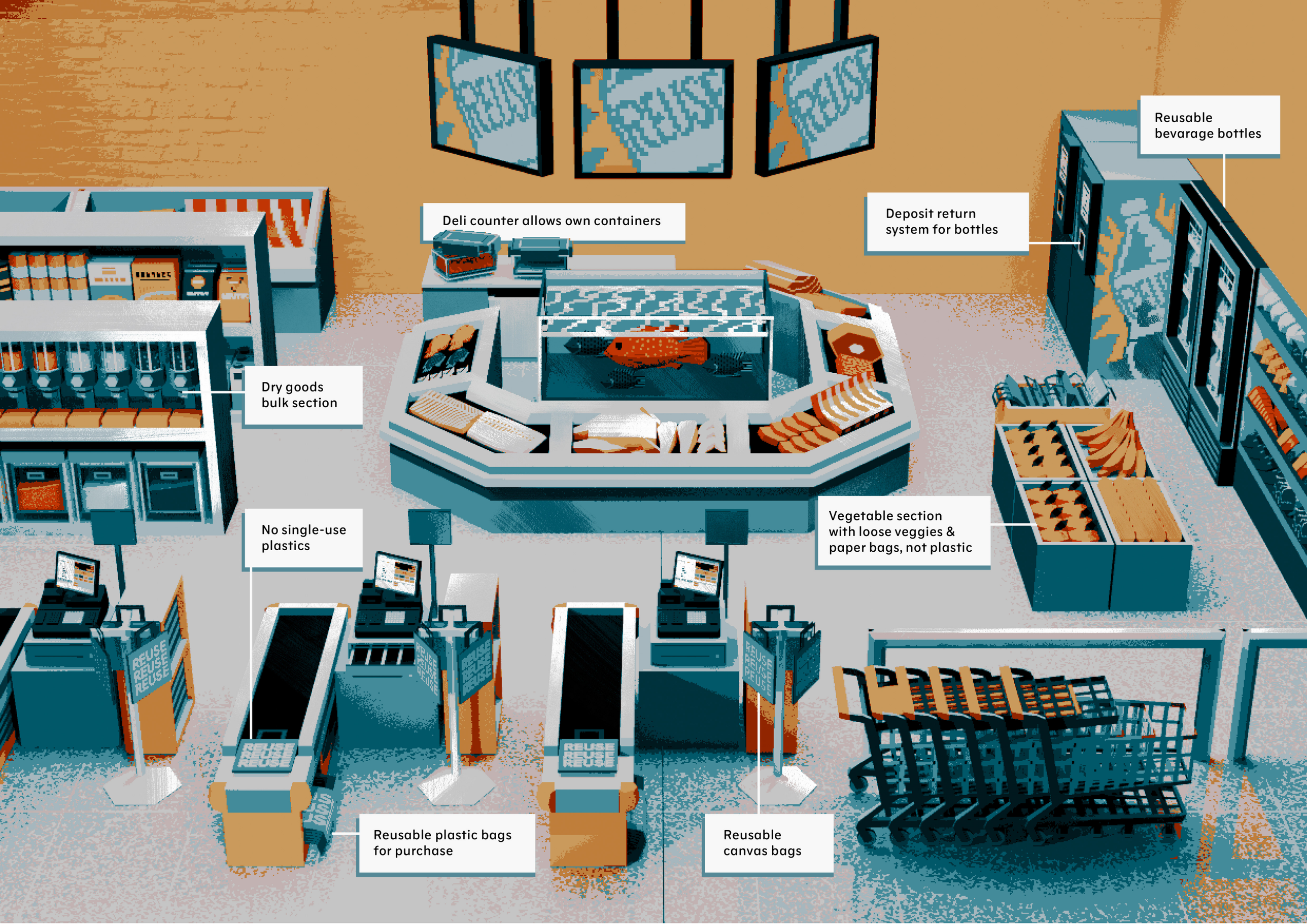


We did not audit behind the scenes, logistics related business practices. There are many ways that supermarkets can reduce their plastic waste creation in their delivery and supply operations, but these cannot be audited by a member of the general public walking around the store. For this reason, we looked at practices that are related to the customer and are visible on the shop floor.



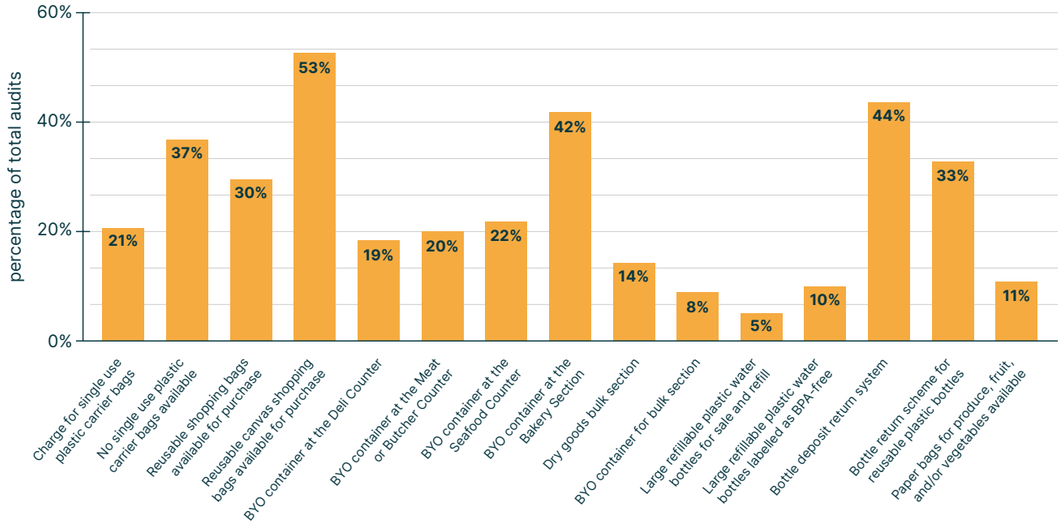
Plastic pollution positive business practices

Business practice that reduces plastic pollution (or plastic pollution positive business practice)	Why is this a positive business practice?
Charging for single use plastic carrier bags	Charging a small fee for single-use carrier bags has been proven to reduce the amount of carrier bags people use at the supermarket. Many countries have laws mandating a charge to reduce their usage.
No single use plastic carrier bags available	Even better than a fee, simply not providing single-use carrier bags means customers have to use reusable bags.
Reusable shopping bags available for purchase	Best when combined with the above two measures, reusable shopping bags mean that customers do not need to use single-use. These can be cotton or plastic bags. It is important that these bags are priced high enough to incentivise people reusing them many times.
Bring your own container at a deli counter, butcher counter, seafood counter or bakery section	Counters such as deli, butcher, seafood and bakery used to be commonplace in supermarkets, but are steadily declining in many places. They allow customers to buy products that are not already packaged in plastic. A staff member will normally pack the products. This allows a customer to bring their own reusable container in order to avoid single-use packaging. Some stores have policies allowing this, and some actively encourage it.
Store has a dry goods bulk section	Before plastic packaging, dry goods such as rice, nuts, flours, grains and dry fruits would have all been measured out for the customer from a bulk container. Bulk goods sections reduce the amount of plastic packaging needed, and reduce food waste as the customer chooses exactly the amount of product they need. These sections are common in zero waste stores and traditional markets.
Large refillable plastic water bottles/jugs for sale and refill	In areas where tap water is not safe to drink or where people prefer to avoid it, large refillable plastic water bottles are often used with a water cooler. The use of these avoids many smaller volume water bottles being used.
Refillable plastic water bottles/jugs are labelled as BPA free	Refillable water jugs often contain the toxic additive BPA. If these jugs are for sale, they should be labelled as BPA free.
Bottle return system with a deposit	Bottle return systems, otherwise known as deposit return systems (DRS), are an essential measure for reducing plastic pollution from beverage bottles. The annual Break Free From Plastic brand audits find beverage bottles to be the number one collected item each year. This system places a small deposit on each beverage bottle to be refunded once the bottle is returned. It requires the participation of supermarkets, but is often mandated by law. Countries where DRS systems are implemented achieve a very high return rate for beverage bottles leading to high recycling.
Bottle return system for reusable plastic bottles	Many bottle return systems are for recycling of the bottles. An even better system is DRS for reusable bottles. A deposit is placed on the bottle, which is then returned to the store, then sent to be washed and refilled with the product. Reusable plastic bottles can be reused up to 20 times.
Paper bags for loose fresh produce	Where loose fruits and vegetables are available, most stores offer lightweight, clear single use plastic bags to contain the produce. Paper bags are a good alternative where a bag is essential or a reusable option is unavailable, and should be on offer instead of the plastic bags.

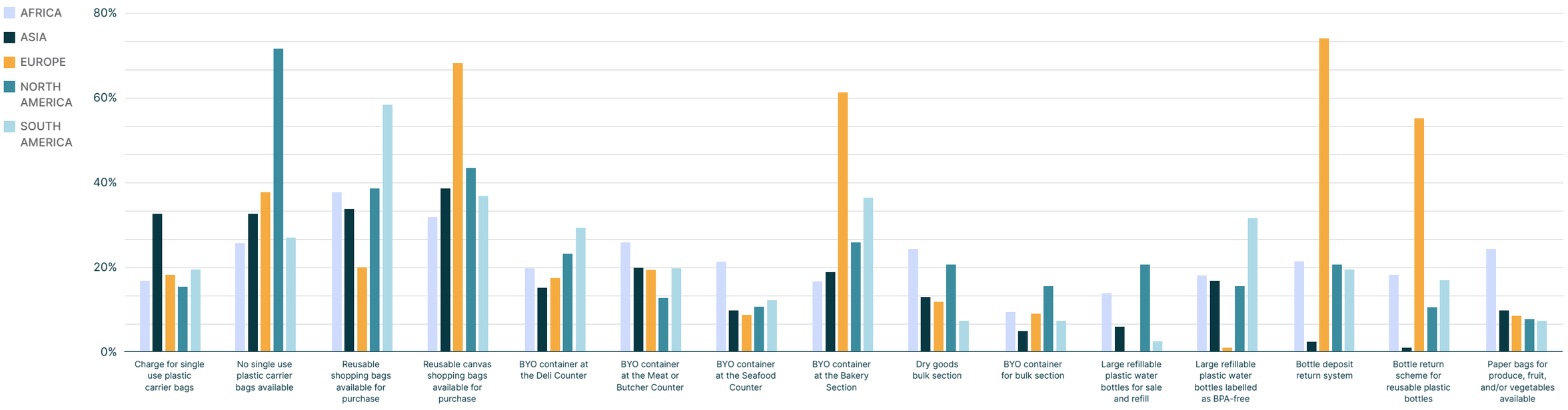

Deli counter allows own containers
Deposit return system for bottles
Reusable bevarage bottles
Dry goods bulk section
No single-use plastics
Vegetable section with loose veggies & paper bags, not plastic
Reusable plastic bags for purchase
Reusable canvas bags

The table below shows the percentage of the total audited stores that have implemented each positive business practice. Underneath that is a regional breakdown. We can see here that on a global level there is a long way to go to achieve a supermarket sector committed to reducing plastic pollution. All of these measures are proven to be feasible - already existing somewhere in the world in a major supermarket. There is no reason why every measure should not be implemented in 100% of audited stores around the world. Some of the most effective business practices such as bulk goods sections are found in a tiny number of the audited stores - a huge failing of the global supermarket sector.

PERCENTAGE OF TOTAL AUDITED SUPERMARKETS THAT HAVE IMPLEMENTED POSITIVE BUSINESS PRACTICES



PLASTIC POLLUTION POSITIVE BUSINESS PRACTICES



Plastic bags and alternatives

On a global level, we can see that the most commonly implemented positive practices are related to avoiding single-use plastic bags by charging for them, removing availability, or providing reusable alternatives. Specifically, 53% of stores globally offer cloth or canvas shopping bags and 30% of stores sell plastic reusable bags. These measures go hand in hand with the practice of charging for single-use plastic carrier bags or not having them available at all - two measures that are also commonly implemented in stores globally at 21% and 37%, respectively. The regional breakdown shows that reusable shopping bags made of canvas are most commonly found in European stores over plastic reusables, whereas South America presents an opposite trend in which plastic reusables are more commonly found than canvas. North America has the highest prevalence of stores not providing plastic bags. However, these findings remain inconclusive due to a very small sample size. Nonetheless, anecdotally it is common for US stores to offer single-use paper bags to consumers. Swapping one single-use material for another is not a sustainability win when more durable reusable alternatives are available.

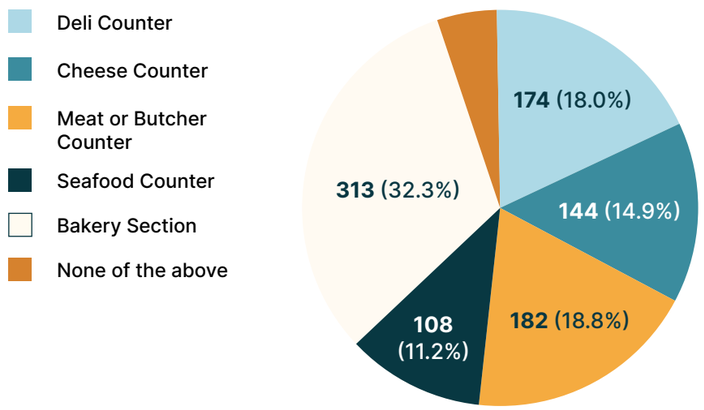
Legislation targeting single-use plastic bags, such as mandating the implementation of bans and levies, represents the most common form of plastic pollution regulation in the world. These laws are found in the EU (Single Use Plastic Bag Directive), 28 states across the US, and national regulations across Asia, Africa and Latin America. Over 100 countries and territories have plastic bag laws. This suggests that the **high percentage of audited stores implementing plastic bag related business practices is driven by legislation, rather than proactive corporate policy.**

Counter services

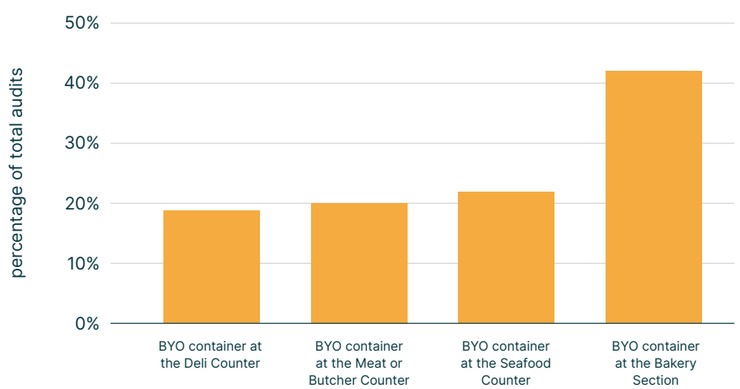
Supermarket counter services, including deli, butcher, seafood, and bakery, offer shoppers the flexibility to buy exact product quantities. They also present opportunities to avoid pre-packaged food and reduce plastic. Ideally, supermarkets would allow and encourage customers to bring their own containers to place their products in, completely avoiding the need for plastic packaging. Anecdotal evidence suggests that stores have been closing many of these counters over the years, further driving up reliance on plastic packaged food.

The chart below shows the percentage of audited stores that have these counters, and below that we can see that for most services only 20% of stores allow you to bring your own containers. For the bakery section, over 40% of stores are happy for personal containers to be used. **Changing store policies to allow and encourage customers to bring their own containers is an easy and cost-free practice to reduce plastic waste.** In light of the need to reduce plastic use urgently, and the anticipated impact of future plastic regulation, stores should think ahead and protect their counter services from closure.

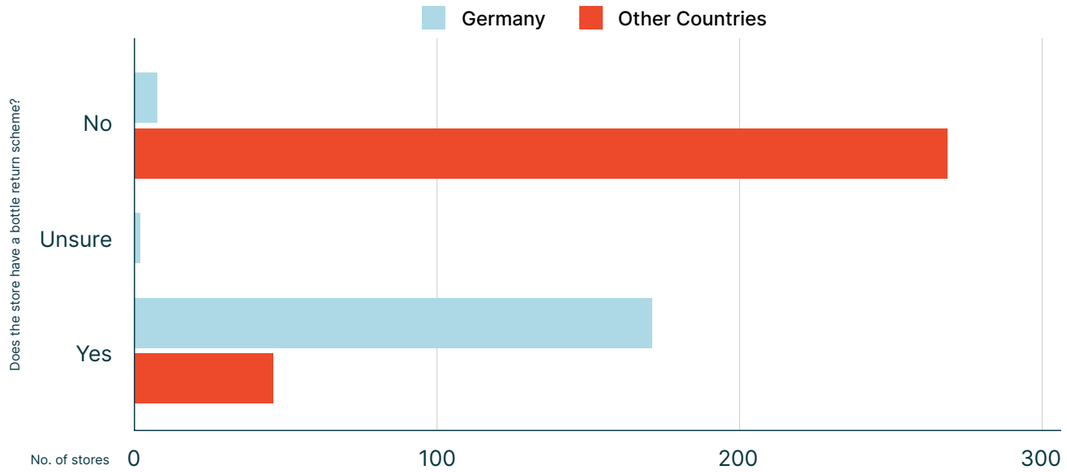
SERVICES AVAILABLE IN AUDITED STORES



PERCENTAGE OF TOTAL AUDITED STORES WHERE CUSTOMERS CAN BRING THEIR OWN CONTAINER



PRESENCE OF BOTTLE RETURN SCHEMES IN STORES, GERMANY AND REST OF THE WORLD



Deposit return systems for bottles

Deposit return systems (DRS) work by adding a small, refundable fee to the price of beverage containers at the point of sale. When consumers return the empty containers to a designated collection point such as a supermarket, they get this deposit money back. In Germany, for instance, consumers receive a refund of EUR 0.15 (USD 0.18) for plastic bottles and EUR 0.08 (USD 0.09) for glass bottles when they return reusable containers.

This system is highly effective at reducing plastic pollution because the direct financial incentive motivates people to return their containers, leading to much higher recycling rates (often over 70-90%) than typical curbside programs. DRS is widely recognised as a key measure for reducing plastic use and preventing beverage containers becoming litter. In most places where DRS has been implemented, it is used for recycling. However, with small adjustments it can be used for refillable beverage bottles which significantly increases the environmental benefits. PET bottles are one of the most financially viable plastic types to recycle. Informal waste pickers around the world rely on collecting them to make a living. Any transition to deposit return systems and reusable beverage bottles must ensure a just transition for waste workers so they do not lose livelihoods.

When looking at data from the audited stores globally, the picture looks relatively positive with 44% of stores having a bottle deposit scheme for recycling, and 33% of stores having a bottle deposit scheme for refillable plastic bottles. However, the regional data present a significantly different story when comparing German data to the rest of the world. While 171 audited German stores have bottle deposit schemes, only 46 stores in the rest of the world have them. This is a shocking failure for global efforts to reduce plastic pollution - beverage bottles are the most frequently found item of plastic pollution in annual brand audits, and two of the worst plastic polluting companies are beverage producers - Coca-Cola and PepsiCo. Outside of Germany, bottle deposit schemes were found mostly in stores located in Chile, Senegal, Mexico, and Slovenia. Notably, Coca-Cola has applied deposits for reusable and refillable bottles in these locations to encourage returns. This suggests that the implementation of deposit return schemes in the abovementioned countries stem from Coca-Cola's business strategies rather than the supermarkets themselves.

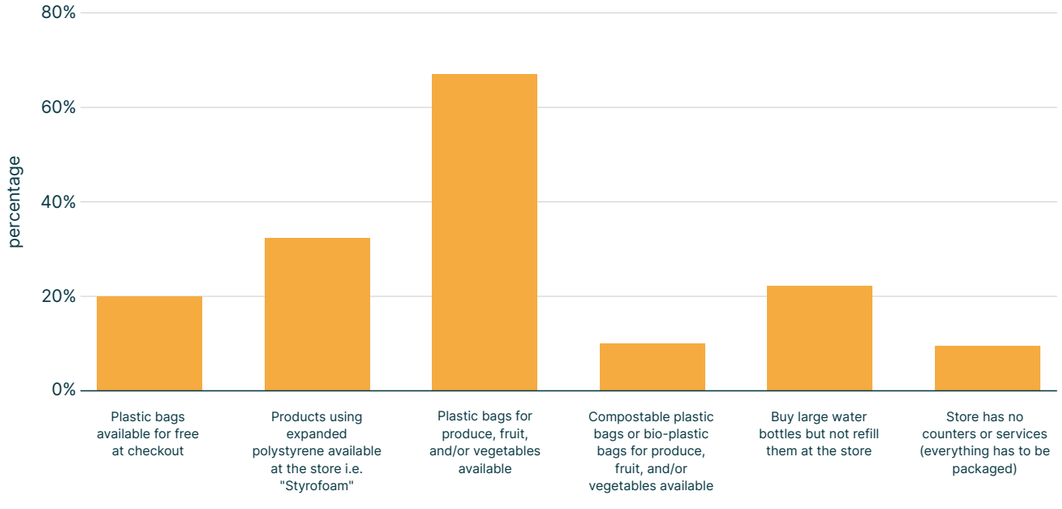
While the results for Germany are positive, this is another measure that is driven by legislation. Germany has had laws mandating deposit return schemes for recyclable bottles since 2003, and schemes for refillable bottles are voluntary but popular.

We call on supermarkets and consumer goods companies to collaborate and establish deposit return systems for reusable beverage bottles globally, and not just in a select few countries. They possess the power to significantly reduce plastic consumption through this single action and should not delay implementation until mandated by legislation.

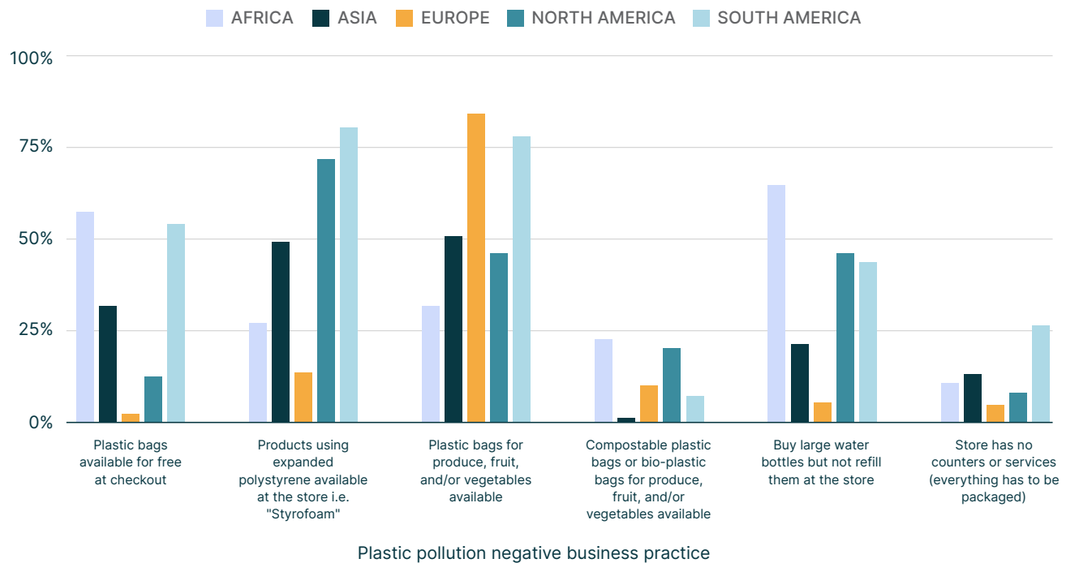
Plastic pollution negative business practices

Business practice that increases plastic pollution (or plastic pollution negative business practice)	Why is this a negative business practice?
Plastic bags available for free at checkout	We know that placing a small charge on plastic bags dramatically reduces the amount of bags people use, so conversely, having no charge will make people use a lot more. Plastic carrier bags are a significant source of plastic pollution.
Products using expanded polystyrene (or styrofoam) available in store	Expanded polystyrene (EPS) is sometimes used for food packaging and takeaway hot beverage cups. It is now known to leach the carcinogenic chemical styrene, and if released into the environment it breaks down rapidly into microplastics.
Plastic bags for loose fruits and vegetables available	Small lightweight plastic bags used for loose fruits and vegetables are easily littered and do not need to be used when paper or reusable alternatives exist.
Compostable or bio-plastic bags for loose fruits and vegetables available	In an effort to appear eco-friendly, some companies replace traditional plastic bags with compostable or bio-plastic bags. These are false solutions to the plastic crisis, and sometimes create more problems than they solve.
Large water bottles or jugs are for sale but cannot be refilled	If large refillable water jugs cannot be refilled in store, the customer is incentivised to buy more of them, increasing plastic use.
Store has no counter services at all so everything has to be packaged	Without counter services such as butcher, bakery etc, a store only sells foods wrapped in plastic packaging.

PERCENTAGE OF AUDITED STORES GLOBALLY IMPLEMENTING PLASTIC POLLUTION NEGATIVE BUSINESS PRACTICES



PERCENTAGE OF AUDITED STORES IN EACH REGION IMPLEMENTING PLASTIC POLLUTION NEGATIVE BUSINESS PRACTICES



On a global level, the picture doesn't look too bad. The prevalence of negative practices that increase plastic pollution is below 40% of stores globally apart from the plastic produce bags being available in 67% of audited stores. However, the regional breakdown shows a more nuanced picture.

Over half of the audited stores in Africa and South America provide free plastic carrier bags at checkout. In contrast, very few European stores offer them for free, largely due to existing legislation aimed at reducing plastic bag use. Nonetheless, there are several countries in Africa and South America[1] that have enacted plastic bag regulations. Kenya, for instance, implemented one of the most stringent bans in 2017, with penalties of up to four years imprisonment or a large fine. All stores around the world should stop providing plastic bags for free, without waiting for legislation to compel them. This measure has been shown to be effective, and accepted by customers.

Polystyrene products are widely found in audited supermarkets across North America, South America, and Asia, a concerning issue considering the material's tendency to leach styrene, a known carcinogen. This is alarming as polystyrene is often used for hot beverage cups and takeaway food packaging, where the heat can increase the amount of chemicals leached. There's a significant global push advocating for a ban on polystyrene due to its toxic and environmentally harmful properties. Legislation is a key driver in shaping supermarket behavior regarding plastic use. For instance, the UK and Europe have already banned polystyrene takeaway food packaging, which explains their limited presence in stores audited within these regions. Conversely, in countries without such bans, the material remains is commonly found in stores.

1 Chile, Democratic Republic of the Congo, Ecuador, Mexico, Nigeria, Puerto Rico, Senegal, Tanzania

Brand Results

STORE NAME	PARENT COMPANY	NUMBER OF AUDITS
7-Eleven	7-Eleven, Inc.	5
Aldi	Aldi Süd or Aldi Nord	4
Asda	Walmart	1
Auchan	Auchan Holding	3
BILLA	REWE Group	2
Carrefour	Carrefour SA	2
Coop	Coop (Switzerland)	8
Edeka	Edeka Group	10
Eroski	Eroski	2
Food Lion	Ahold Delhaize	1
Harris Teeter	Kroger	1
Hipermercado Lider	Walmart Chile	1
Lidl	Schwarz Gruppe	60
Little Waitrose	John Lewis Partnership	1
Lotte Mart	Lotte Corporation	1
Makro	SHV Holdings	2
Mercadona	Mercadona S.A.	5
Migros	Migros	6
Morrisons	Clayton, Dubilier & Rice	1
Netto Marken Discount	Edeka Group	12
Norma	Norma	2
Oxxo	FEMSA (owned by Coke-Cola)	4
PENNY Markt	REWE Group	1
Rewe	REWE Group	100
Sainsbury's	J Sainsbury plc	2
Spar	Spar International	2
Superindo	Delhaize Group	3
Tesco	Tesco PLC	3
Walmart	Walmart Inc.	5
Whole Foods	Amazon	1

Top 5 Parent Companies

The top 5 parent companies represented in the 2024 Supermarket Audit data are:

1. REWE GROUP (GERMANY)

Retailers: Rewe, BILLA, Penny Market

2. WALMART (US & MEXICO)

Retailers: Bodega Aurrera Express, Sam's Club, Walmart

3. EDEKA GROUP (GERMANY)

Retailers: Netto Marken Discount, Edeka

4. TRANSGOURMET HOLDING AG (SWITZERLAND)

Retailers: The Co-operative Group

5. SCHWARZ GROUP (GERMANY)

Retailers: Lidl

Due to the wide distribution of auditing efforts, it's not possible to do meaningful comparisons of brands across multiple countries or regions, or comparing different brands in the same countries, with the exception of Germany. For future audits, we would like to focus on brands that are present in different regions to see how their practices differ in each region.

Using the top 5 brands as a snapshot of the overall data, we can see how there are discrepancies in store business practices even within the same brands. For the question 'does the store have a dry goods bulk section?' the following results were recorded for the top 5 brands:

REWE GROUP (GERMANY)

93 out of 98 stores have no bulk section
3 stores do have

SCHWARZ GROUP (GERMANY)

55 out of 61 stores have no bulk section
6 stores do have

EDEKA (GERMANY)

17 out of 22 stores have no bulk section
5 stores do have

This shows that within a brand group, the necessary knowledge and supply chain connections exist to be able to provide a dry goods bulk section, as each of these brands have a few stores with them. So with this capability, what is stopping these supermarkets from rolling this type of plastic-free shopping out to all customers?

Conclusion and a message to global supermarkets

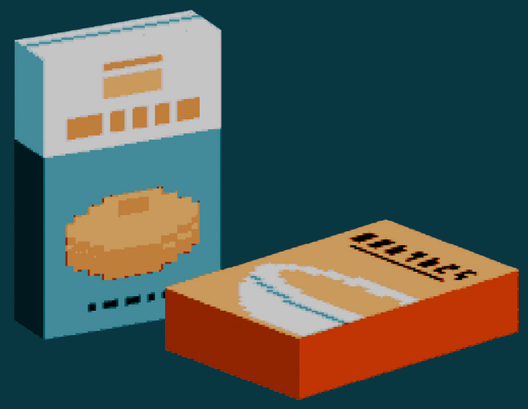
This first ever global supermarket audit offers a glimpse into the business practices of supermarkets around the world, examining their role in either exacerbating or reducing plastic pollution. The findings reveal that these businesses largely fail in tackling the massive amount of single-use plastic packaging found in their stores. All of the positive business practices identified in the audits can and must become standard in every supermarket. There is no practice discussed in this report that cannot be rolled out universally, as they are already implemented and functioning somewhere in the world. It is shocking that we could not find a single store that has implemented every one of these measures, in the 496 stores across 27 countries that we audited.

There are some instances of positive practices in stores, but these efforts are largely required by legislation. A classic illustration of this is the implementation of deposit return systems for beverage bottles. In Germany, where such systems are legally mandated, an impressive 96% of audited stores have adopted this practice. However, outside of Germany, this figure drops to a mere 17%.

Another example of how successful legislation is at forcing stores to be more mindful of their plastic use is the case of single use plastic bags. Across Europe, their reduction is governed by the Single Use Plastic Bag Directive that mandates countries to reduce bag use by either banning them outright or placing a levy on them. Outside of Europe, legislation on single-use plastic bags is one of the most common forms of plastic pollution legislation there is. While we are unable to check the exact laws in every country where we have audited supermarkets, studies show over 100 countries and territories have some kind of plastic bag laws. This trend aligns with our findings which show that 53% of stores globally offer reusable canvas shopping bags for sale, and 30% provide reusable plastic bags.

However, there is a lot of room for improvement. More stores should consider eliminating single-use plastic carrier bags entirely (currently 37% do not have them available) or charging for them (currently 21% of stores have a charge for single use bags), given that these measures have been shown to reduce plastic bags in shoreline debris by 25% to 47%.

Supermarkets have largely remained outside of the global conversation on plastic pollution, despite being the primary point-of-sale channel for consumer goods companies to sell products in plastic packaging. This lack of pressure to improve is evidenced by the patchy policies supermarket companies have to address the issue. A 2022 Changing Markets report that surveyed major European supermarket brands revealed that only a few prioritized reducing plastic use, with most retailers focusing on packaging recyclability.



Recycling is wholly insufficient in the face of the ever growing mountain of plastic waste - globally only 9% of plastic has ever been recycled. The report also noted that policies varied across different countries even within the same brand. Supermarkets wield enormous purchasing power, if major brands set policies focused on reuse, bulk and loose goods purchasing and other measures to reduce overall plastic use, suppliers would be swift to change.

This snapshot of supermarket operations shows that legislative measures are the primary drivers of positive practices, as voluntary efforts, by comparison, are notably infrequent. Walmart, for instance, was previously a member of the United States Plastic Pact, a public-private consortium dedicated to realizing a shift to a circular economy in the US. However, the retail giant recently withdrew from the pact, citing its inability to meet the plastic reduction and recyclability targets set for 2025.

Strong global rules are needed to hold the supermarket sector accountable for its business practices. Consumers are seeking low-plastic choices, but these must be readily available, affordable, and offer the same product variety they expect. A 2019 survey by IPSOS across 28 countries found that three in four global consumers want to buy products with as little packaging as possible, yet our audit shows that supermarkets are not meeting this demand. Simple changes in business practices at the store level could quickly make a significant impact, while research and development takes place on how to reduce plastic for more challenging products. All of the business practices examined in this audit are already being implemented in various stores globally, but we found no single store that has adopted all of these practices. Not so long ago, butcher counters, reusable glass beverage bottles, bulk sections for dry goods and loose fruits and vegetables were the norm, but now they are becoming harder to find.

This trend must be reversed for the sake of our climate and health.

Our demands to the global supermarket sector:

Firstly - ***the global retail sector should urgently implement the simple positive business practices found in this report.*** These practices should become the norm, in all stores, in all locations. Supermarket brands should support legislation that will enable the shift to low plastic shopping, as voluntary efforts have been inconsistent in driving results. Nonetheless, they should not wait for regulation to make these changes.

TO SUPPORT DEEPER PLASTIC CUTS, THE SUPERMARKET SECTOR SHOULD:

1. Transition towards 30% reusable packaging and reuse models, across categories, by 2030.

Reusable packaging and/or reuse models must replace existing single-use plastic packaging and products. This transition must be enabled and supported by law and policies, and it must be prioritized by a legally binding Global Plastics Treaty. Fast-moving consumer goods (FMCG) companies and other parts of the supply chain will need to work collaboratively to adapt accordingly to new retailer models.

2. Retailers must reveal their total plastic footprint across supply chains.

Plastic footprint transparency must include:

- Plastic used in products, packaging, transportation, and carrier bags
- Both own and other brands, across product categories
- A disclosure in units, weight, format, and types of plastic

3. Retailers must set specific, measurable, and time-bound plastic targets that eliminate toxic chemical additives and single-use packaging.

These targets must be applied consistently across all categories, products sold and markets, including both own brand and other branded plastic products. Retailers must ensure that removing single-use plastic packaging is not replaced with other single-use packaging materials.

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ABOUT BFFP

#BreakFreeFromPlastic is a global movement envisioning a future free from plastic pollution. Since its launch in 2016, more than 2,700 organizations and 11,000 individual supporters from across the world have joined the movement to demand massive reductions in single-use plastics and push for lasting solutions to the plastic pollution crisis. BFFP member organizations and individuals share the values of environmental protection and social justice and work together through a holistic approach to bring about systemic change. This means tackling plastic pollution across the whole plastics value chain – from extraction to disposal – focusing on prevention rather than cure and providing effective solutions.

www.breakfreefromplastic.org

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